20th Annual Helen Joseph Memorial Lecture

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Faculty, students, distinguished guests,

I am deeply honored to have been invited to deliver this prestigious lecture. An impressive list of scholars, professionals, activists and politicians have stood here, celebrating Helen Joseph's life and legacy – a woman whose courage and conviction left a lasting imprint on South Africa's democracy.

The values that motivated Helen – courage, solidarity, commitment to collective action – remain central to addressing the most pressing problems of our time. Indeed, they are more vital than ever. In the face of resurgent authoritarianism, widening inequality, escalating armed conflict and growing assaults on women's rights, they offer a powerful counterpoint to exclusionary and dehumanizing narratives that glorify self-interest, and the pursuit of privilege through power and domination.

They are values that continue to animate women's rights activists across the world. From the "Woman, Life, Freedom" movement in Iran demanding democratic reform and civil liberties, to the Indigenous women in Bolivia and Colombia, mobilizing to protect ancestral territory from mining and deforestation. From the domestic workers in India and across the globe, rallying to obtain basic recognition as workers with rights to fair wages and social protection, to the women in Gaza and Sudan who are working tirelessly to support their communities through the horrors of war and occupation and demand lasting peace and justice.

In this year of global summits—from the Financing for Development Conference, to the World Summit on Social Development to COP30—these ongoing struggles remind us, that progress toward social justice rarely begins in meeting rooms or marble halls.

It is through the activism, advocacy, and alliance-building of people like Helen Joseph and the countless other women in the Federation of South African Women that pressure for change is built, that the demands of the most marginalized are amplified, and that a shared vision of justice is forged.

The lecture I am delivering today focuses on the role of social protection in promoting gender equality and social justice. To do so, I will draw heavily on the research and analysis we conducted for UN Women's recently launched flagship report "Harnessing Social Protection for Gender Equality, Resilience and Transformation".[i]

We worked on this report for two years, and it has benefited from consultations with almost 100 experts – from academia, civil society, and the UN system – including Prof. Leila Patel to whom I owe the honor of this invitation.

Cascading crises and rising inequalities

The title of our report – and the reference to resilience, in particular – reflects the fact that, in 2022, when we started to work on this project, it seemed impossible to talk about the role of social protection in promoting gender equality, without talking about the broader context of repeated shocks and cascading crises. Three years later, this reality is undeniable.

From the Covid-19 pandemic to the food, fuel and financial crisis, from escalating climate disasters to an unprecedented number of violent conflicts, repeated shocks have continued to wreak havoc with people's lives and livelihoods. The impacts of these events are not equally felt by everyone. To paraphrase from UN Secretary-General Antonio Guterres's 2020 Nelson Mandela lecture: while some navigate these turbulent waters in superyachts, others are left clinging to drifting debris.[ii]

Inequalities dramatically increase vulnerability to shocks, and in the process, they chip away at people's agency, dignity, and basic human rights. Covid-19 provided a major lesson in this regard. While high-income countries mobilized massive fiscal stimulus packages in response to the pandemic, low-income countries lacked the fiscal space to support health systems, social protection, or economic recovery.

Within countries, structural disadvantages in the labor market compounded the impacts of the crisis. Like in South Africa[iii], in many countries, women, low-income and informal workers, migrants, and members of historically oppressed racial groups were among the first to lose their jobs and incomes, and among the last to regain them—if they did at all.

Inequality also has deep political ramifications, undermining solidarity, trust in public institutions and faith in the possibilities of democratic representation. From what I understand, these trends are not unfamiliar to a South African audience. Across countries and regions, we see how right-wing populist movements capitalize on them, weaponizing legitimate grievances to propagate various brands of regressive ethno-nationalism, often alongside anti-immigrant and anti-gender rhetoric. Where such forces have gained access to state power—whether through the ballot box or by force—we have seen hard-won gender equality gains reversed, often as part of larger, thinly veiled authoritarian projects.

This "wilding" of domestic politics – as Nancy Fraser[iv] calls it – reverberates on the global stage as well. Multilateralism is faltering under pressure: some governments have withdrawn from international commitments on climate change and gender-based violence; the system has remained paralyzed in the face of escalating humanitarian crises in Ukraine, Gaza, and Sudan; and major donors have slashed aid budgets, while military spending is set to rise yet further, with devastating consequences for women and girls, particularly those in the Global South.

Harnessing the potential of social protection (500)

Clearly, social protection alone cannot solve these systemic crises. But it remains a foundational pillar of broader strategies needed to transform societies towards gender equality and social justice.

Social protection is also part of a "thick" understanding of democracy – where economic and social rights give material substance to the promise of political equality. In South Africa, Helen Joseph contributed to such an understanding at the Congress of the People in 1955 through what she herself called her "social worker's speech"– focusing on, and I cite: "the right to homes and houses, the ending of hunger, the provision of medical care, the care of the aged, the sick, the young and the family"[v]. Today this thick understanding of democracy is reflected in the constitution of your country – one of the most progressive globally when it comes to social and economic rights.

Throughout this lecture, I will refer to social protection as a set of policies and programmes designed to reduce and prevent poverty, vulnerability and social exclusion throughout the life course. I will also refer to social protection systems as nationally specific constellations that comprise programmes or schemes – both contributory and non-contributory – as well as the processes required for their operation such as legal frameworks, governance, delivery and financing mechanisms.

In an increasingly unstable world, robust, gender-responsive social protection systems can play a key role in protecting women and girls against poverty during times of crisis; strengthen their ability to cope with critical life course events like losing a job, having a child or entering old age; and nurture capabilities, livelihoods and hope for the future. In doing these things well, social protection could also help rebuild trust in public institutions and social solidarity, and renew fraying social contracts between people and the state.

But these outcomes are not automatic. In the remainder of this lecture, I want to explore what it would take to realize the transformative potential of social protection. This is not a new question, and African scholars have contribute to its exploration from different angles, including the late Thandika Mkandawire, my former director at the United Nations Research Institute for Social Development, who in the early 2000s coined the term transformative social policy.

My focus today is specifically on how social protection can be harnessed to promote gender equality. I will make three key arguments:

First, it is important to establish the basics. Social protection is not a privilege, it is a human right. Currently, however, almost half of the world's population remains excluded. Closing gaps in social protection coverage between high- and low-income countries, formal and informal workers, women and men is critical for turning the right to social protection into a lived reality.

Second, social protection must go beyond its current narrow focus on income transfers. To address the structural drivers of women's poverty and vulnerability, we need integrated

approaches that connect social protection to inclusive employment strategies and quality public services.

Third, it is not only about what kinds of benefits and services are included in social protection systems, but also about how they are delivered. Ensuring that policies and programmes are implemented in ways that uphold the dignity and agency of women and girls is essential to unlocking their transformative power.

Having made these three key arguments, I will finish with some reflections on financing, and highlight some bright spots of recent multilateral efforts to foster solidarity and collective action on this issue, against the prevailing global environment.

Establishing the basics

Let's start with the basics. For social protection to play a meaningful role in reducing and preventing poverty, it needs to *reach* enough people with benefits that address risks and vulnerabilities *across the life course* and that are *high enough* to meet basic needs. In social protection speak, this is usually referred to as the triad of coverage, adequacy and comprehensiveness. Our report shows that gender gaps and biases persist in all three areas.

In 2023, for the first time, more than half the global population – 50 per cent of women and 54 per cent of men – was covered by at least one social protection benefit – an increase of almost 10 percentage points since 2015. Even so, 2 billion women and girls and 1.8 billion men and boys remain without access to any form of social protection globally. What is more, gender gaps in social protection coverage have widened, particularly in lower-middle income countries, suggesting that recent gains have benefited men more than women.

Inequalities between countries remain significant. While high-income countries have edged closer to universal coverage and middle-income countries have made important strides in closing gaps, coverage in low-income countries is below 10 per cent, with little progress since 2015. In geographic terms, coverage is lowest in sub-Saharan Africa, while gender gaps are widest in Central and Southern Asia. These gaps are particularly concerning in light of the devastating climate change impacts that countries in these regions are already experiencing, even though they have contributed least to the crisis.

A closer look at Sub-Saharan Africa reveals that despite important progress over the past 10 years, overall coverage remains low and even lower among women – with just about 14 per cent of women covered by at least one social protection benefit compared to almost 17 per cent of men.

Coverage of maternity benefits has increased from 3.5 to just under 6 per cent – but this still leaves the overwhelming majority of African women without income support during this crucial stage in their lives. Social assistance to vulnerable populations has gone up – but in most countries there is no sex-disaggregated data, so we have little information about who within the household receives a cash benefit or can make decisions over how it is spent.

Evidence shows that even where women gain access to these schemes, low benefit levels and inconsistent payments often limit their impact on gender equality outcomes.

In light of these gaps, extending social protection to those who are currently excluded is critical. This includes large swathes of women in informal employment – small-scale farmers, domestic workers, waste pickers, street vendors and market traders. In sub-Saharan Africa nearly 90 per cent of women and 84 per cent of men are in informal employment. The exclusion of informal workers from social protection is often referred to as a 'missing middle'. But clearly this is a missing majority, of those not considered 'poor enough' to qualify for narrowly targeted social assistance programmes but lacking the capacity to make regular contributions to social insurance.

The Covid-19 pandemic put a spotlight on the devastating consequences of this lack of protection; and in many countries it accelerated discussions about how to extend social protection to informal workers. Lessons from reform efforts across countries suggests that solutions need to be tailored to the heterogenous nature of informal employment and the reality that women often work in the most precarious informal jobs.

Reforms also benefit from the direct involvement of affected groups. For instance, countries such as Ghana, Mexico, Tunisia and South Africa have made notable progress in bringing domestic workers under the purview of their social security laws—driven by decades of sustained mobilization by domestic workers' organizations. This is an important step forward, but legal entitlements alone are not sufficient. Effective implementation requires complementary measures, including awareness-raising among both workers and employers, incentives for registration, robust labour inspection mechanisms, and accessible claims and complaint processes.

Strengthening non-contributory, tax-financed schemes that offer protection across the life course presents another pathway to achieving at least a basic level of income security for all. Non-contributory schemes – like the social grant system in South Africa – are particularly important for women, who – because of pervasive gender inequalities in paid employment and unpaid care – continue to face significant disadvantages in contributory schemes. In Latin America, for example, non-contributory social pensions have played an important role in narrowing gender gaps in pension coverage – even though gaps in benefit levels remain significant.

Many African governments recognize the need to scale up investments in social protection. Kenya, for example, introduced a universal social pension for all older persons aged 70 and above in 2018. In 2022, the scheme reached almost 800,000 older persons, 60 per cent of whom were women. Unlike many other transfers that are targeted at the *household* level, this is an *individual* entitlement—thereby increasing the likelihood that older women will have an income of their own.[vi] I also understand that South Africa is exploring how to make the Social Relief of Distress grant permanent – a move that would, for the first time, provide a form of unemployment protection to those outside of the formal sector.

Towards integrated approaches

Ensuring that more women have access to social protection and that the benefits they receive are sufficient, regular and predictable is really important to providing them with a stream of income that helps cover basic material needs. But poverty is about more than a lack of income. More than two decades after Amartya Sen's (1990) Development as Freedom transformed how we think about poverty and development, this may sound like stating the obvious. And yet, much of the policy discourse around social protection continues to focus narrowly on the mechanics of cash transfers.

Social protection experts worry endlessly about who should receive them, when, and how. Rarely do they pause to listen to women living in poverty about what else they may need to break the cycle of deprivation, reclaim their agency, and build hope for a better future.This is what your colleague Tessa Hochfeld – a former professor at the Center for Social Development in Africa – did. In her bottom-up analysis of the Child Support Grant she started with the lived experiences of women in poverty. And if you haven't read her posthumously published book "Granting Justice: Cash, Care and the Child Support Grant" (2022), I recommend it to you wholeheartedly.

Because what she found resonates across countries and contexts. Women's experience of poverty is inseparable from the multiple and intersecting inequalities they experience in their day-to-day lives: labor markets and local economies that offer limited prospects for access to decent jobs, livelihood opportunities, a stable income; early and intense unpaid care responsibilities for children and other family members; limited access and poor quality of basic services, including education, health and housing for themselves and their dependents; and pervasive gender-based violence that often remains unrecognized and unaddressed by public institutions.

This brings me to my second point: if social protection is to achieve its transformative potential, it needs to respond to these non-material risks and vulnerabilities as well. Indeed, research shows that the effect of social protection on gender equality outcomes is greater when income transfers form part of a more holistic support package. Comparative research on Brazil and South Africa, carried out by Leila Patel, Wendy Hunter and Natasha Borges showed for example, that cash transfers in both countries had positive effects on women's agency; but the benefits were greater in Brazil where the transfer is embedded in a stronger public health and social service network.[vii] Evidence from other contexts also suggests that additional support in the form of asset transfers or agricultural inputs; vocational and life skills training; counseling and links to support networks, such as producer cooperatives or savings groups can enhance the impact of cash transfers.

Across countries, low-income women report lack of affordable childcare as a barrier to pursuing training, employment or livelihood alternatives. Economic stress and limited financial autonomy also often increase the risk of gender-based violence. Few cash transfer schemes respond to this reality in a meaningful way, but there are exceptions. One such example comes from the Dominican Republic's *Supérate* programme.

In 2022, the programme reached 1.3 million households with a cash transfer of approximately $30 per month. Two new components provide additional support for caregivers and survivors of gender-based violence. The first is aimed at strengthening the offer of community-based care services for children, the elderly and persons with disabilities, supporting women to engage in training and job search. The second component provides survivors of gender-based violence with support to rebuild their lives, including additional cash and access to training and job mediation. These components have been implemented in close cooperation with the Ministry of Women.

Programme-level innovations such as these can make a big difference in women's lives; but they cannot address broader structural constraints, such as the lack of decent jobs or the dismal conditions of many public services after years of austerity and underinvestment. Addressing these issues requires efforts that extend beyond the scope of individual programmes. Integrated approaches that combine social protection, employment and macroeconomic policies are needed to promote decent job creation and raise the resources needed for improving access to quality public services, including care services.

The co-benefits of integrated approaches are increasingly recognized. Countries in Latin America and beyond are spearheading integrated national care systems, for example, that combine social protection with training to support paid and unpaid caregivers and investment in public services.

Governments shy away from such investments, because the costs are high – but so are the returns. Globally, the ILO estimates that large-scale investments in child- and elder care services could generate close to 300 million jobs by 2035.[viii] For South Africa, Debbie Budlender and Jerome de Henau estimated that making childcare services universally available for all children under the age of 5 could create 2-3 million new jobs and raise female employment rates by 10 percentage points.[ix] New tax and social security revenue from these jobs would reduce the required annual investment by about a third to 2.1 per cent of GDP.

Such investments are part and parcel of the shift towards economies that prioritize care and wellbeing. As feminist researchers from the global South, such as Lynn Ossome, Shirin Rai and Dzodzi Tsikata, have pointed out, however, notions of care and social reproduction need to be expansive. Particularly in agrarian contexts, policy responses cannot focus exclusively on care services, but need to consider access to land and commons as a foundation of everyday survival, care and social reproduction.[x] Particularly in the context of the climate crisis which is rapidly eroding women's already fragile access to these resources, this calls for a much deeper economic transformation that restores and protects collective resources, supports regenerative forms of production, and adapts social protection systems to the reality of rural livelihoods.

Not only what, but how: a focus on delivery and implementation (999)

So far, I have focused primarily on the *what* of gender-responsive social protection. I have argued, first, for the need to get the basics right and expand social protection coverage and adequacy—especially for women in informal employment. Second, I have stressed that while

income transfers are an important lifeline for women living in poverty as well as those who risk falling into poverty, their transformative potential can only be realized when they are linked to a broader offer of services and sustainable livelihood options.

The final point I want to make has to do with *how* these benefits and services are delivered. Compared to policy and programme design, the gender dynamics of delivery and implementation have received less attention from researchers and are almost completely absent from mainstream policy debates about social protection.

In these debates, delivery is often approached as a series of technical steps that include activities such as outreach, enrolment and the disbursement of benefits. Digitalization and better data systems are foregrounded as solutions for reaching people in need in a timely, efficient, and effective manner, particularly during crises. Data and technology are important tools. Deployed for the right reasons and with adequate safeguards, they can certainly be leveraged to make social protection more inclusive. But the disproportionate focus on technical tools obscures how central human relations are to sustaining effective delivery and to shaping women's experience as social protection recipients and providers.

As a trained social worker, I think Helen Joseph would have known and appreciated this.

Globally, women make up two-thirds of the social sector workforce.[xi] Occupying roles as social workers, case managers, community health workers, school counselors, and welfare officers, they are often the most visible face of the state—particularly for marginalized communities. Well-trained and supported, they can identify hidden vulnerabilities, broach sensitive issues such as gender-based violence, and connect women to ancillary services—legal aid, shelter, counselling, or health care. But too often, frontline workers are themselves subject to institutional neglect, facing poor employment security, lack of adequate social protection, unclear job descriptions, excessive caseloads, and inadequate training.

Ethnographic research reveals how these difficult working conditions—combined with perverse institutional incentives and discriminatory social norms—can distort implementation and deepen the very exclusions social protection schemes aim to address.

In her account of the experiences of Child Support Grant recipients, for example, Tessa Hochfeld documents how overstretched social workers repeatedly failed to respond to critical needs from mental health to child protection and sexual violence.

In Egypt, Hania Sholkamy found that social workers under-enrolled eligible women who lacked official documents, because they feared criminal liability. Institutional incentives were set to penalize them for errors of inclusion, but not for inaction and exclusion.[xii]

And in Peru, Tara Cookson's ethnographic study of the Juntos cash transfer programme revealed that frontline workers often imposed informal "shadow conditions" on rural and Indigenous women – giving the impression that their continued access to the cash transfer depended on fulfilling unwritten expectations such as cultivating a community garden, cooking for the school lunch programme, or giving birth at a designated health facility rather than at home. [xiii] These unofficial conditions were sometimes the result of the personal whims

of local managers; other times, they were an attempt to leverage women recipient's labour to fulfil their own overwhelming professional responsibilities. For many recipients shadow conditions were unrealistic and burdensome. How could they grow a vegetable garden without access to irrigation? How could they give birth at a clinic that was several hours walking distance from their village?

These examples show that the quality of case management systems – and the relationships that front-line workers forge with recipients – matter hugely for gender-responsive delivery.

Where social protection and public service delivery is short-staffed or trust in state officials is low, women's and community-based organizations often play critical roles in bridging gaps, easing access, and enhancing bottom-up accountability. A good example of this comes from the Self-Employed Women's Association (SEWA), a trade union representing almost 3 million informal women workers in India. SEWA runs community-based resource centres, known as Shakti Kendras, where workers and volunteers help women obtain health insurance cards, strengthen their capacity to use the health system independently, and broker links with the insurance scheme itself to share the women's feedback. Over time, the Shakti Kendras have created partnerships through public dialogue meetings with local governments, strengthening the rapport between elected officials and the communities they serve, and creating opportunities for women to assert their needs.

Frontline workers and civil society organizations have also proven essential for making digital social protection delivery work in practice. During the COVID-19 crisis, for instance, Argentina's fully digital Family Emergency Income programme relied on frontline workers to support registration, resolve complaints, and ensure timely payments. And in many countries, organizations of informal workers supported their members to navigate the often complicated digital platforms that mediated access to government support schemes.[xiv]

In a nutshell, making social protection work for women requires more than gender-responsive design—it demands institutional investments: in adequate staffing and decent working conditions for frontline social workers, alongside training and support that empower them to uphold recipients' dignity, agency and rights; in relationships between local governments and grassroots organizations to enable effective last mile delivery and bottom-up accountability; and in digital tools and data systems—not to replace, but enhance human engagement geared towards ensuring inclusiveness, equality and the realization of rights.

Closing

In closing, let me return to where I began—with Helen Joseph and the values that defined her life: courage, solidarity, and collective action. These values are just as essential today as they were during her time. Confronted with overlapping crises and deepening inequalities, they offer a compass to guide the way forward. They are reflected as well in the theme that South Africa defined for its G20 presidency – Solidarity, Equality, and Sustainability – grounded in Ubuntu philosophy which stresses interconnectedness and collective responsibility.

We have seen that social protection holds powerful potential to advance gender equality, build resilience, and lay the foundations for more just societies. But realizing that potential means confronting serious challenges, including: persistent gaps in coverage due to chronic underinvestment; policy silos and fragmented delivery systems; and growing political resistance to redistributive and gender-responsive policies.

Overcoming these challenges—and creating the conditions to advance social justice in a world tilted against it—requires strategies that would have been familiar to Helen Joseph: bottom-up organizing, principled leadership, and alliance-building across difference. Even in a multilateral system under strain, there are some bright spots where we see these strategies in action.

Countries like South Africa, Spain and Brazil are choosing cooperation and solidarity over polarization and isolationism. They have taken on leadership roles by hosting global summits that seek to reinvigorate multilateralism: the G20 in Johannesburg; the Financing for Development Conference in Seville; and COP30 in Belém. These summits remain important spaces for renewing shared commitments to gender equality and social justice, even in the face of geopolitical headwinds.

Recently, we have also seen modest progress on financing— which remains a major bottleneck for low- and middle-income countries striving to build comprehensive, gender-responsive social protection systems. Many African countries are trapped in a vicious cycle of debt and underinvestment. At least 30 countries in the region are spending more on debt interest payments than on basic services, such as health or education.[xv]

Analysts agree that this issue was not adequately addressed at the Financing for Development Conference in July. But there was progress in other areas. Member states agreed, for example, to support developing countries to increase social protection coverage by at least two percentage points per year and urged the IMF to safeguard social spending in fiscal consolidation programs. The prospect of a UN Tax Convention – which is currently being negotiated in the General Assembly on request of the Africa Group – could help create fiscal space, while enhancing progressivity and transparency. And a new initiative, launched by Brazil and Spain, aims to make sure that the world's super rich also pay their fair share of tax.

The upcoming World Summit on Social Development in Doha offers another opportunity to ensure that gender equality is a guiding principle for efforts to protect social expenditure and to expand access to social protection – so that we see gender gaps closing, rather than widening further.

Meanwhile, at the national level, many countries are making progress through gradual but deliberate policy innovation and adaptation—despite fiscal constraints. As I hope to have highlighted, countries can extend coverage and adequacy progressively. They can adapt programs to include care and violence prevention services, and improve service quality as they go along.

Promoting greater gender-responsiveness also requires stronger evidence, including the kind of feminist research that I have drawn on for this lecture and that foregrounds the lived experience of marginalized groups of women and girls.

Most importantly, it requires grassroots organizing and a recognition, on behalf of state actors, that they can achieve more by working together with civil society and women's rights organizations.

At the current conjuncture, holding the line on gender equality and pushing for progressive policy change often feels like an uphill battle. But we can draw inspiration from history. Helen Joseph's life and legacy reminds us that *in the climb* we can build strength, forge solidarity, and make change possible.

Thank you.

Endnotes

[i] Unless referenced otherwise, the source of this lecture is: Staab, S., L. Williams, C. Tabbush and L. Turquet. 2024. "Harnessing Social Protection for Gender Equality, Resilience and Transformationv". World Survey on the Role of Women in Development. New York: UN-Women.
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